



ORGANIZATION SOLUTIONS

Policies and Procedures Moves

Since 1999 we have helped hundreds of clients move, and we have seen what works and what doesn't work when it comes to moving families from home to home. The one thing we know for sure - having an experienced team of moving professionals on board will ensure success.

We have established invaluable working relationships with the key service providers used during the move process, and when working with Squared Away our clients have access to our vast array of trusted and reliable resources.

Squared Away collaborating and working with these key professionals as one team is what gives us the ability to provide a successful move that is more enjoyable and less stressful our clients and their families.

Team Work

It requires a great team, and multiple people, in order to provide all of the services and manpower required to make the moving process a smooth transition for the client.

And - the ability to provide those services without letting the client's stress or the chaos of the surroundings affect our work or attitude.

What We Do

There are many things involved in the moving process and it's important to know what services Squared Away provides and what we leave to the other experts.

Pre-Move

- Space Planning (Storage Areas, Closets, Kitchen)
- Pre-move sorting, editing and elimination
- Pre-move organizing to make the unpacking process more efficient
- Outlining tasks and timelines necessary for closing the old house and moving into the new home
- Arranging for disposal or removal of any unwanted items from the old house
- Shelf-Lining



What We Do - Continued

During the Move

- Unpack every box and set up every closet & cabinet with expert precision.
- Get the key areas (kitchen, bedrooms & bathrooms) completely set-up and properly organized so that the client can function as a family as quickly as possible. Leaving them to complete the non-essential areas.
- Working in just one area of the home – typically the kitchen.

After the Move

- Maintain the organization in the home with scheduled follow-up visits.
- Help the client rethink how they are using space and storage areas as their family grows and their needs change.

The Services We Don't Provide

- ☒Pack (Insurance Reasons)
- ☒Unpack & *STASH*
- ☒Clean
- ☒Move Furniture or Heavy Boxes
- ☒Interior Design
- ☒Electronic Installations
- ☒Art Hanging
- Box Removal / Trash Hauling

How Long Does a Typical Move Take?

There are so many factors that affect how long it will take to get a client unpacked and settled in their new home. And, while it's hard to know for certain how long it will take, there are a few things will help you determine what will be involved in the process.

- ☒How organized were things before the move?
- ☒Is there adequate storage?
- ☒How much “stuff” do they really have?
- ☒Is the house actually ready?
Working around painters and electricians can really slow down the process.
- ☒How many pets?
- ☒How many children?
- ☒Will the children be there?
- ☒Do they feel like they have to purge before things get put away?

Scheduling & Flexibility

One of the biggest challenges we face when it comes to offering this service is the flexibility that one must have one it comes to scheduling.

We would estimate that 50% of the time that we schedule a move, the date of the move changes. And many times one move may have several date changes.

Scheduling & Flexibility - Continued

Listed below are just of the few reasons that a move date changes.

- ☒New Construction Delays
- ☒Remodel Delays
- ☒Closing Date Changes
- ☒Inspections
- ☒Travel / Work / School Schedules
- ☒Holidays
- ☒Personal Issues

What this means for you, and the team, is that you too must remain flexible and understanding when it comes to changes and cancellations to your schedule. We will always do our best to give you as much advance notice as possible and, if possible, slide you into another project, but that will not always be possible and your flexibility and understanding is key.

Stress Factor

Moving is considered one of the top life stressors. If you have ever moved, you can understand how disrupting and stressful a move can be. The client's world is being turned upside down, and it is going to be several days before any semblance of order is seen. Layer on top of that - the amount of money they are spending, the hundreds of decisions they are making, things not going as planned, they are tired, AND there are 5-6 strangers in their house touching all of their "stuff."

We have rarely had a client act rudely or treat the team disrespectfully. However, if you find yourself in a situation with a client who is not happy, has raised their voice or is speaking disrespectfully to you or the team it is of the utmost importance to remain calm and professional.

Do your best to assure the homeowner that Squared Away, and the team, will do anything we can to correct the "wrong" or to make things better for them. Let them know that our only goal is to make sure they are happy and we will do everything in our power to make sure that is the end result.

You should ALWAYS make the team leader aware of any such situation. As the team leader they are best prepared to deal with situations like this and it is important for them to always be aware of the customer's mood and satisfaction level. Be discreet when conveying any uncomfortable situation to the team leader, as you don't want to anger or embarrass the client further.

It is important to always remember that 99% of the time WE have had nothing to do with the outburst and it is the client's stress talking – not the client. And more often than not, the client is embarrassed and sorry for their behavior.

Scheduling a Move

Many factors are involved when determining how many team members are scheduled for each move

Here are some of the key factors...

- Team member's schedules
- Lead time
- How much help does the client want?
- Will the client / family be there?
- Do they have a deadline?
- Other scheduled projects

Working as a Team

How the team is divided on a move is dependent on how many team members are working on the project and how many areas we are responsible for handling.

The more team members on the job – the more areas that we can tackle at the same time.

While there is no firm rule on how many people are required to service an area, below is a guideline on the number of people that it will typically take to handle an area.

- Kitchen – 2 People
- Pantry – 1 Person
- Master Closet Hers - 1 or 2 People
- Mater Closet His – 1 Person
- Kid's Room – 1 Person
- Master Bathroom – 1 or 2 People

Team Leader

There is one team leader chosen for each move, and that person is chosen for their experience and their ability to handle the project and manage the team.

If there are multiple people working on a project who are qualified for the position of team lead – the person who will be spending the most time on the project will be the one designated as the team leader.

The team leader is the decision maker and listed below are some of their main responsibilities:

- ONLY person who “speaks” with the client
- Decides who works where
- Decides who works with whom
- Final say in the end “product”
- Decides what products get used

One of the most important responsibilities of the team leader is their role as the “point person” for the team and the client. The client is being bombarded with hundreds of questions from other service providers – not just our team – and that can be an overwhelming feeling for a client.

Factors that Impact the Process

Another major factor that plays a role in how we process a move is the client's schedule. When are they spending their first night in the house? Will they be on-site during the move?

Client Not On-Site

If the client will not be on-site during the process we are afforded some flexibility in how we process the move.

- Flexible Scheduling
- Flexible Hours
- Less Pressure to "Control the Chaos"
- Easier to Tackle Areas Out of Sequence
- Less Interruptions and Questions
- No Pressure to Get Beds Made or Rooms Cleared
- Kids aren't there actively using rooms we are trying to get organized

Client On-Site

If the client will be present each day and they are planning on spending the night in the new home – there are many items that we need to address in order to make the home as peaceful as possible in the midst of all of the chaos.

- Beds Need to be Made
- Kitchen Counters Cleared
- Pantry Unpacked or at Least Accessible
- Get Bathroom Items Accessible
- Do they Need Temporary Shades?
- How late can we stay? How early can we start?
- Semi-Clear Bedrooms & Bathroom of Boxes

For all clients who are planning on spending their first night at the new house on move day, we suggest that they pack an overnight bag for all family members with a few days worth of clothes and toiletries. This will eliminate the need for them to frantically dig through boxes looking for pajamas or a toothbrush at the end of a long day.

We also suggest they pack sheets, pillows, blankets in their own car – do not have the movers pack them in boxes and put them on the truck. Packing them in their own vehicle will allow them / us to easily get our hands on the linens and make the beds before it gets too late in the day.

Other Client Suggestions

- ☒ "Farm-Out" the Kiddos and the Pets
- ☒ Don't Have Play-Dates at the New House
- ☒ Don't Have Their Friends and Family Come and Help Unpack
- ☒ Don't Let the Housekeeper Put Things Away in Areas they Want Us to Do

Valuables / Jewelry

In an effort to reduce OUR stress and liability – we are asking all clients to keep their valuables with them and secured until all work is complete.

So – If you are working with a client pre-move and you know that we are handling their upcoming move – let them know this too! They can't hear it too often.

Un-packers

Many moving companies offer an unpacking service. We encourage clients to use this service in conjunction with our services.

It's a great benefit to us because they are responsible for getting everything unpacked - allowing us to concentrate on getting things categorized and put away.

AND they are the ones responsible for breaking down and removing the boxes and paper!

Speed is Key

We pride ourselves on being one of the most efficient teams in town. There is so much to do when working on a move – there should never be a time you find yourself at a standstill.

Constant movement keeps progress moving forward, and lets the client know that we are being respectful of their investment in our services.

If you are struggling with where something should go or if you find yourself working with a more senior team member who has been pulled away for some reason – KEEP MOVING!!

Things you can do...

- Break-down Boxes
- Remove Trash
- Unpack More Boxes
- Categorize Unpacked items
- Add Labels
- Make Label List

Designated Trash Area

One of the first things the team lead needs to locate is a good place to put all of the broken down boxes and packing paper during the unpacking process.

This area is typically the garage, but could also be a covered back patio or a porte-cochere.

It is best for this area to be hidden from street view. If it is seen from the street it could be in violation of HOA restrictions, neighbors could find it offensive, and the homeowner doesn't want their new house to look "junky" during this process.

It is also recommended that this area be a covered area – especially if there isn't an immediate plan on removing the boxes. If the boxes get rained on – disposing of them is much harder.

Packing Paper

Folding the packing paper that is removed from the boxes saves a ton of space, but it's takes a LOT of time and isn't worth saving the space.

It's ok to stuff the crumpled paper in some of the tall kitchen boxes, but the majority of paper should be placed in large trash bags and the boxes broken down. This will save space and make disposal much

Box and Paper Removal

The team lead needs to ask the homeowners what arrangements, if any, have made for the removal of the boxes and paper.

If no arrangements have been made – the best option is to get as many boxes unpacked when the moving company is still there unloading the truck! Most companies will take back boxes and paper if they are still on-site.

If the moving company has already left – most will, for a fee, come back when all boxes have been unpacked to pickup the boxes and paper.

Physically Unpacking Boxes

Use the box cutters provided in the moving box to open boxes quickly. Cut several boxes at one time so that you aren't wasting time looking for the box cutter with each box you open.

And, while we want you to unpack these boxes as expeditiously as possible - many of the boxes you will be unpacking will contain valuable, breakable items.

Pay attention to what you are doing and be careful – treat everything as if it's a priceless heirloom.

Always stand over the box you are unpacking and unwrap the item above that box. Should something fall out of the paper – it won't fall to the floor, it will fall into the box and land on paper.

Check and double-check the paper. Never toss the box or paper until you are certain that nothing is missing.

Layer of Protection

We don't put anything away until everything has been unpacked. This allows us to see how much stuff there is and how much space is needed for each category.

That means that everything that gets unpacked gets placed on countertops, kitchen tables, islands, dining tables, etc.

It is of utmost importance that we protect all surfaces BEFORE using them as a staging area.

All areas used during the unpacking process need to be covered with paper to reduce / eliminate surfaces from getting stained, scratched or marred during the process. This includes walls. Any item leaned against the wall needs to have something placed between it and the wall.

Not EVERYTHING Gets Unpacked

If you come across plastic boxes – don't unpack them.

These boxes most likely contain specialty items, and are not intended to be unpacked and separated.

Not EVERYTHING Gets Unpacked - Continued

The boxes that are NOT to be unpacked are the easiest things to put away.

AND these boxes are typically big and bulky – so it makes a huge visual impact when you get them out of your working area.

Challenges

There are many challenges you will encounter during the move process, and it will be important to think outside the box for temporary solutions until the problem is resolved.

Here are a few of the common challenges...

- Waiting on Furniture
- Missing Shelves
- Missing Rods
- Too Little Storage
- Area / Room Isn't Ready

Here are a few solutions...

- Use shelves in the closet until the furniture arrives
- Use our rolling racks until the rods arrive
- Use temporary baskets or bins to store things nicely until the shelves or dresser arrive
- Use secondary storage spaces that we don't typically use
- Use primary storage areas differently than normal

What is NOT a solution is leaving things out in the middle of the room or lining things up against the wall of the room.

Reduce the Chaos

Just like with all organizing projects, you want to make sure you are cleaning up your work area as you go. You don't need to stop every 30 minutes to clean, but as you notice that empty boxes are clogging the space and crumpled paper is littering the floor – stop and clean up.

This will allow you to move around more freely, making your job much easier. And it will make the homeowner feel like things are coming together and boxes are disappearing.

Client Perceptions / Mind Games

One of the first areas we tackle is the kitchen, and inevitably the kitchen island and the kitchen counters are easy targets for setting things or placing questionable items.

Meaning – even if the kitchen is complete – it doesn't appear so because the surfaces remain "littered" with

Client Perceptions / Mind Games - Continued

When a client sees a clean kitchen they feel a sense of completion, that progress is being made – there is a light at the end of the tunnel!

As a central hub and a common dumping ground – it's not the easiest thing to achieve, but should be something that everyone works toward – not just those assigned to the kitchen.

New House / Different Spaces

The client's old house and the client's new house are different. They have different layouts and different rooms. When unpacking boxes it's important to keep in mind that just because something was kept in a room at the previous house – it doesn't necessarily mean that it will be kept in that same room in the new house.

It's OK to challenge where something should live, especially if it doesn't make sense. So – if you are unpacking boxes in the laundry room and you come across product that is typically stored in a garage – it's possible they didn't have a garage at their old house.

Moving Company

Often times we are the only ones present when the moving men are unloading the truck; and, even if the homeowner is there – they aren't always available to answer their questions or to make sure that boxes and furniture are getting placed in the right rooms.

Keep your eyes open! As you walk through rooms – spot check boxes to make sure they are in the right area. It is very common, especially later in the day when the guys are getting tired, for boxes to end up downstairs when they really go upstairs.

Make it a point to walk each room with the moving company BEFORE they leave to make certain there aren't boxes in the wrong rooms. This might not sound like a big deal, but it really can be when you discover that 3 large, heavy boxes in the garage need to go to the attic. Or when 12 book boxes are in the downstairs study and they belong in the kid's playroom on the 3rd floor.

Always keep in mind that these men are working in extreme heat, carrying very heavy boxes for several hours on end. It's important to keep them hydrated and fed during this process so that they don't lose energy – or worse, get heat exhaustion. Most companies carry large coolers of water on the truck, but they often run out during the day. The better fed and hydrated they are – the better job they will do and the faster they will work.

If you notice it's lunchtime and the homeowner hasn't taken it upon himself or herself to order lunch for the moving men – tell the team leader so that they can make arrangements to order food for the team. When the moving team has to leave the jobsite to get lunch – it can seriously put a kink in our progress if boxes we need are on still on the truck.

Misc. Tools

☒ Step Stool

☒ Move Box

☒ Rolling Rack

☒ Tool Box

☒ Phone Chargers

Move Box

- Check the inventory when you check it out
- Check the inventory before you leave the clients
- Inventory sheet behind the label
- If you use something (trash bags, Clorox wipes, felt pads) be sure to include it on your invoice
- Keep in a central location where everyone can access
- Return items when finished using them – that will help keep things from getting lost and will make them available for other team members.

Long Days

When you know that you are scheduled for a move you should expect to work long days with short breaks. We ask that you pack a lunch, snacks and water so that you can stay energized and hydrated throughout the day.

If you need to take a break because you are hungry or thirsty – please do so. Just excuse yourself from the project and take a quick break. We need you to keep your energy up in order to provide the best service.

Product

It's our objective to make product tracking as easy and accurate as possible.

This can become quite difficult when you consider...

- How much product we use
- The number of people accessing the product
- The fact that most moves span several days
- Additional products are pulled / ordered during the process

When it gets out of hand...

- ☒Using product from other jobs
- ☒Products are NOT purchased by office
- ☒Additional products pulled from office and not recorded
- ☒Products are returned to office and not recorded
- ☒Missing Receipts
- ☒Products aren't kept in one central location and items get left behind

Product Placement

The product taken on a typical move is quite **VOLUMINOUS!** It is important to find one central location for all products to be stored during the move.

This area should be out of the main walkways and work areas so as not to become a nuisance.

It's best if the product can be placed in a coat closet or small storage closet so that it's out of site and isn't adding to the visual chaos already in place.

Product Management

Once the staging area has been established all team members should be notified of its location.

Any unused product taken out during the day should be returned to this location and should not be left lying around the house.

As you are pulling product – pay attention to stock levels. If you see that certain items are running low – bring it to the attention of the team leader so that additional supplies can be secured if needed.

As the move progresses, and it's clear that certain products will not longer be needed - these items should be removed from the staging area and returned (following the product return guidelines) to the office or store.

Areas of Responsibility / Accountability

When you are “assigned” an area to work by the team leader – that area is now YOUR RESPONSIBILITY.

You will be the person who is to make certain that all of the organizing in that room is completed and done so in accordance with our standards.

You will need to make certain that you have the tools and products you need to make that happen – and to work with the team leader if additional products or tools are needed for your area.

BEFORE you leave for the day you will be responsible for informing the team leader of your progress and the remaining work to be done.

Once you have determined that your area is complete - you and the team leader will review the area together so that you can give them all of the information they need about the area and they can give their final stamp of approval.

Importance of Accountability

Most of the stress and pressure of the move falls on the team leader. They are the one who looks around and sees ALL of the boxes still waiting to be unpacked. They are the one who can hear the anxiousness in the client's voice. They are the one that will be there throughout the move, and know that what doesn't get done by others will ultimately have to be completed by them.

With multiple team members, working in multiple areas throughout the house, it becomes quite difficult for a team leader to keep up with each area and it's state of completion. That becomes doubly so when you factor in that everyone's schedule is different and people are coming and going at different times throughout the day.

We feel that there are a multitude of benefits that will come from implementing areas of responsibility.

Here are just a few....

- Team members knowing they are ultimately responsible for a specific area will give them a better understanding of the pressure the team leader is feeling – just on a smaller scale. This is great training for future leadership positions.
- There will be less opportunity for things to fall thru the cracks with each member taking ownership of specific areas and knowing that they are ultimately responsible for the work done in that area.

- With each walk-thru - the team member can get first-hand feed back from the team leader. What worked, what didn't? The walk-thru should be looked at as an opportunity to ask questions and to give feedback so that we can all improve on how we do things.
- With each area and room that a team member gets "assigned" over the course of several moves and with each walk-thru they do with the team leader – the more experienced they will become will all aspects of the home, BUT also the move process.

Final Walk Thru – Punch List

Once we have completed all areas in the home (that we are responsible for) we will do a final walk-thru.

The team leader will walk each and every room, and review each and every drawer, cabinet and closet to give their final stamp of approval.

The team leader will make a final "punch-list" for anything they feel still needs attention. This could be missing labels, swapping out product, adding extra hangers – all of the final details needed to make it perfect!

This walk thru will typically be done with the team leader and the team member who will be responsible for completing all items on the "punch-list."

And it will be our goal to make sure that team member is available to do so within 48 hours.

Important Information When Working in an Office During a Move

It is important to know that organizing a client's files should ONLY be done when that is what we have been specifically hired to do.

If you are working on a move or helping a client move back into their office after a remodeling project – it is imperative to know that re-working or reorganizing the client's files is NOT to be done.

Even if the client is requesting our help with their files – doing so during the move is not the best time, and could cause serious delays to the progress of the move. It is best to schedule additional appointments for the organization of the client's file.

When unpacking files in either of these situations – PAY ATTENTION and BE PATIENT. Before taking any files out of the boxes – wait until you have identified all boxes that contain files. While the files are still in the boxes – see if you can identify any type of order that these files may be in. Don't hesitate to ask the homeowner to help you identify the order that the files should be removed and placed in the new file drawers.

Misc. Information

- Client's driveway and area immediately in front of the house is reserved for moving trucks.
- Washers and gas dryers need to be disconnected by a plumber prior to moving.
- If scheduling a move in a high-rise – you will need to reserve the service elevator.
- Safes are best moved if empty. Certainly can not have ammunition or firearms inside.

Typical Product Taken

- 2 Wood Drawer Insert Sample
- 6 Green Cutlery
- 4 Blue Utensil
- 6 Yellow Cutlery
- 6 Vanity
- 2 Blue Expand-a-Shelf
- 2 Green Expand-a-Shelf
- 8 Packs IKEA Inserts
- 2 Pantry Baskets (6 Large, 8 Medium, 8 Small, 6 Extra Small)
- 2 Canvas Bins (6 Large, 8 Medium, 8 Small)
- 2 Hangers – Shirt and Clip
- 2 Asst. Storage Boxes
- 2 Ladder
- 2 Move Box
- 2 LABELS for all Areas
- 2 Label Maker